info@dataartistry.co.uk www.dataartistry.co.uk DATA ARTISTRY

User Guide version 2.0

1 Introduction

PrintAdmin is a FileMaker Pro™ based database that covers all the essential processes required to administrate a print business.

PrintAdmin is ideally suited to the growing business because of its content and price. Encompassing all aspects of running a print business, from winning new business, to the raising of purchase orders and job tracking, with the increasingly more important FSC reports.

This administration tool will allow information across the company to be shared[1], giving quick access to everyone in the company and truly allowing teamwork. Any paperwork generated by a company should be keyed only once, but the details can be used time and again.

Developed over many years with input from a variety of businesses, we think PrintAdmin covers the essential everyday tasks. One thing that we pride ourselves on is the interface, simple to navigate with clean, clearly labelled buttons, making PrintAdmin a part of your day without making it what you do!

2 Executive Summary

PrintAdmin has an incredible amount of features encompassing all aspects of running a print business, from the initial logging of potential clients' details through to final invoice.

[1] Applies to multi-user version only

2.1 Customer relationship management
Address and company contacts are kept alongside any correspondence – including emails, and are visible to all using PrintAdmin.
The database features marketing emails and letters to be sent to many contacts at once. Personalising the correspondence and recording which marketing messages have been sent against the company record.

2.2 Quotes, Purchase Orders, Purchase Invoices and Sales Invoicing
Quick generation of day-to-day paperwork. Quotes can be produced with or without the use of standard price lists, purchase orders can be generated directly from quote or independently and directly from supplier records. Purchase Invoices can be entered into PrintAdmin and linked back to Purchase Orders.
Sales Invoices raised in a matter of minutes, again with or without origination from quote. Each of these aspects has a 'direct to email' facility making the 'paperless' office an ever-closer prospect.

2.3 Jobs
The job section links all other aspects together so that you can easily see costs associated to a job, invoices and delivery notes raised. There are some other useful job features such as Proof Forms, recording of sundry items e.g. colour copies or couriers. This section also includes FSC details for later reporting.

2.4 Users and passwords
All users of PrintAdmin must have a record within the system. This governs which areas of the system to which they have access. It is also a useful facility for recording employees' home and contact details.
There isn't a limit to the amount of users that can access PrintAdmin, but every user must have a password.

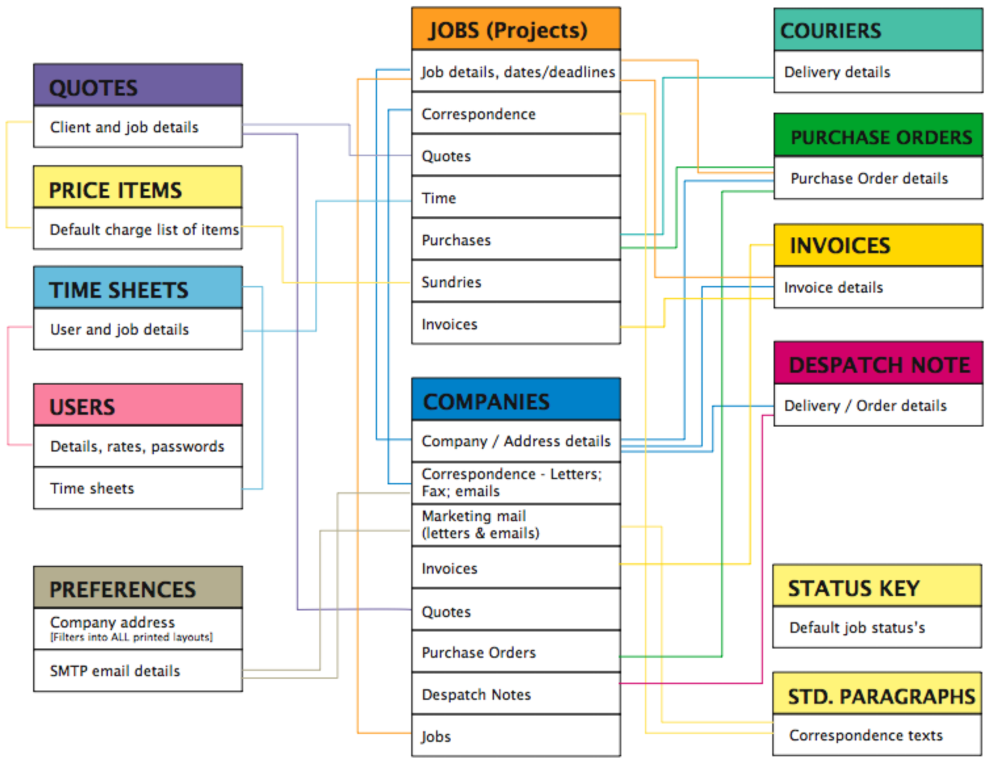
2.5 Reports
Every section of the database has a list view that summarises the 'numbers'. For example the purchase order list shows total net, total vat and total gross. Any search performed will summarise e.g. a range between two dates. Lists appear for quotes (potential business); purchase orders; and invoices. There are also many pre-programmed reports.

2.6 Export to Sage
There is an export function so that once Purchase Invoices and Sales Invoices have been entered or raised, these can then be exported ready to import into Sage Accounts[2]

[2] Designed to work with Sage Line 50

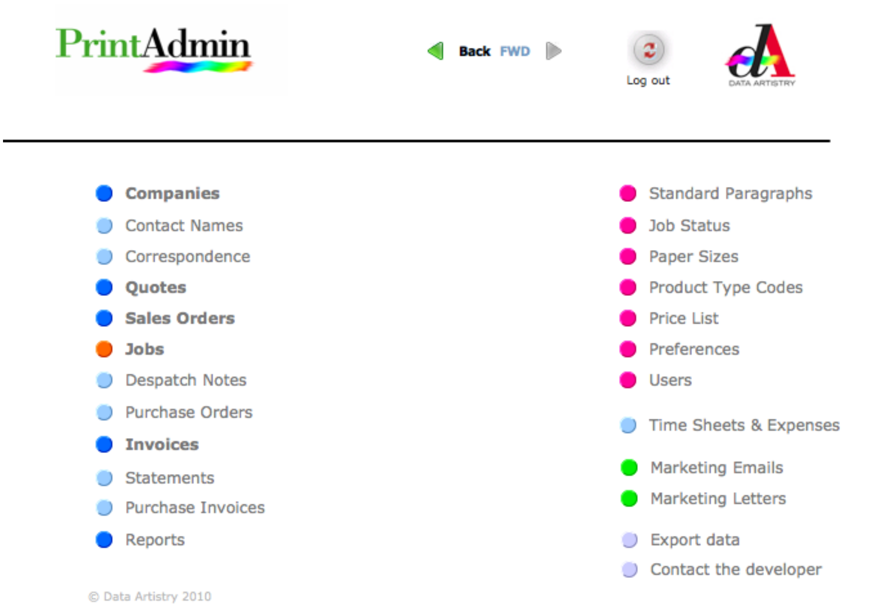
3 How PrintAdmin is put together

Once any data is keyed into the database e.g. a company address, it can be used time and again. Selected for an invoice or linked to a quote. The diagram shows how data is cross-referenced; the colours indicate the 'flow' of data.



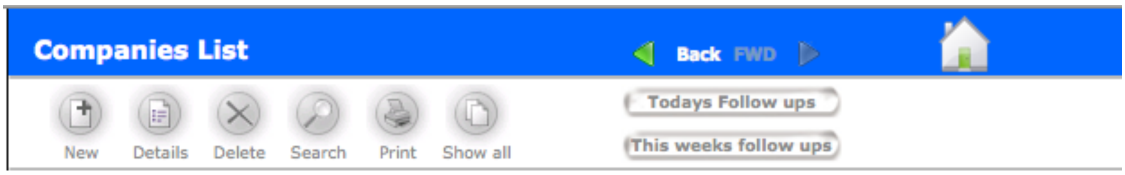
4 Features of PrintAdmin

4.1 Menu options



4.2 Button Bar

Throughout the database main navigation is done using the button bar as shown below. This is split into two parts. There are navigation forward and back buttons and home button in the coloured strip across the top where the place name is also shown.



The level below those buttons is consistence throughout the database, however the function does change according to which area of the database you are working within e.g. if in the companies section of the database clicking ‘new’ will create a new company record.

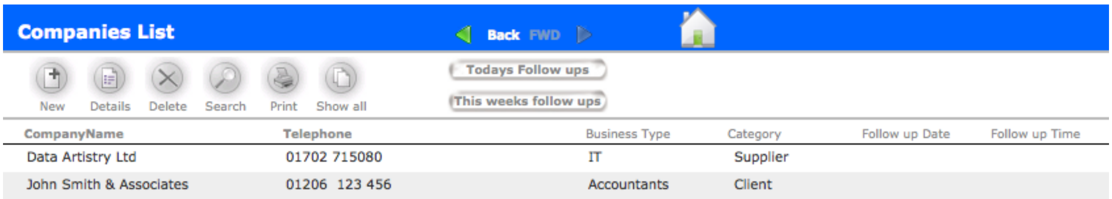
The ‘List’ button toggles to a ‘detail’ button when you switch between the two views. Delete, Search and Print buttons do exactly as the name suggests, the search options will be reviewed in more detail later in this guide. The ‘Show all’ button refers to showing all the records, this option can only be used after a search or when a button that selects a specific group of records to display e.g. performing a find. Clicking ‘Show all’ will bring all records back into view after viewing a selected few.

You can also use the FileMaker Status bar across the very top of the screen to move through records by clicking on the book pages.

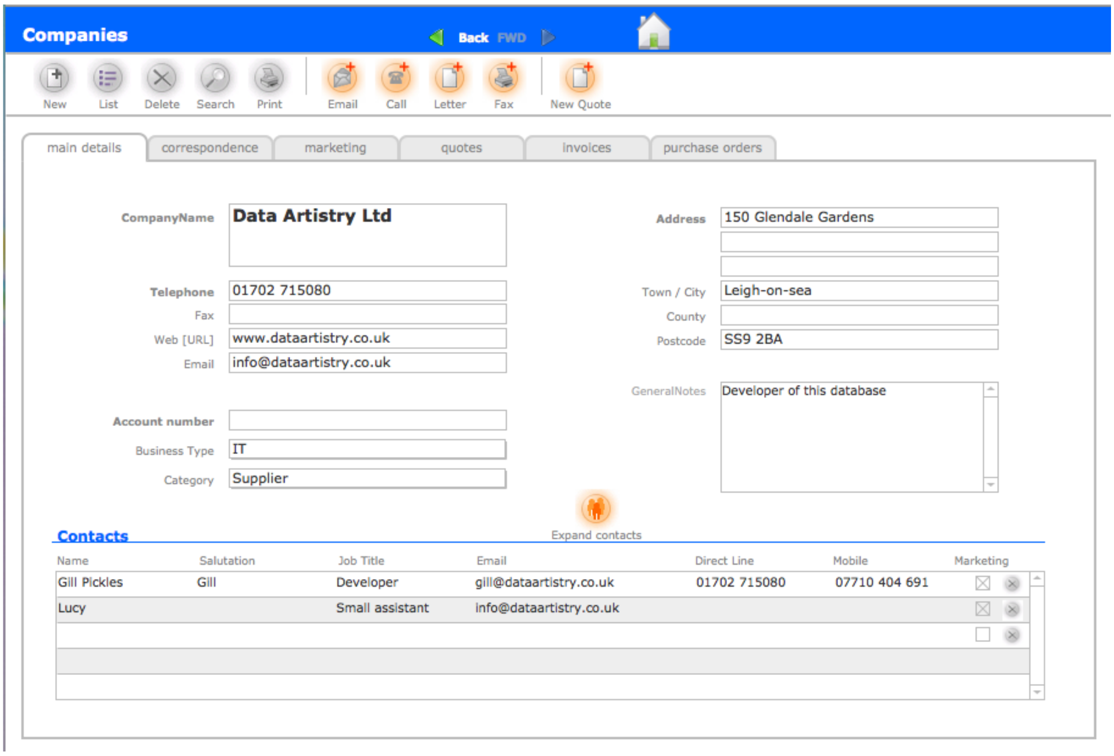
Those are the basic buttons that apply throughout PrintAdmin, other buttons will be clearly labelled and all buttons have a cancel option, so don’t be afraid to click on an option to try it. One final point is that there are arrows pointing at things, clicking the arrow will take you to view the item that it points at e.g. will take you to view company contact details as shown.

4.3 Companies

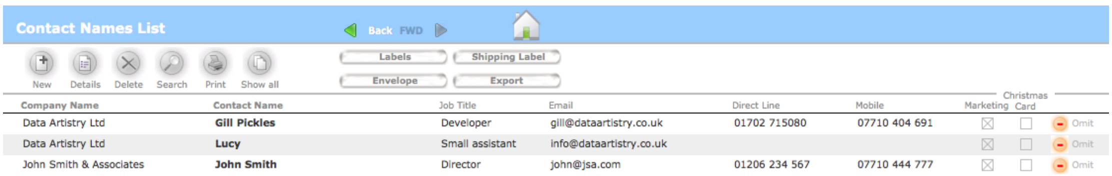
All sections of the database have lists similar to that shown below.



Clicking on a row will display the companies' information in more detail. The tabbed headings across the top will display that part of the companies' detail e.g. Correspondence will list all correspondence with the company record being viewed.



The bottom - contacts section - allows for multiple contacts within each company and clicking the 'Expand contacts' button will allow you to view those as a list and search individual names to produce labels, envelopes, Christmas cards, or export the list.

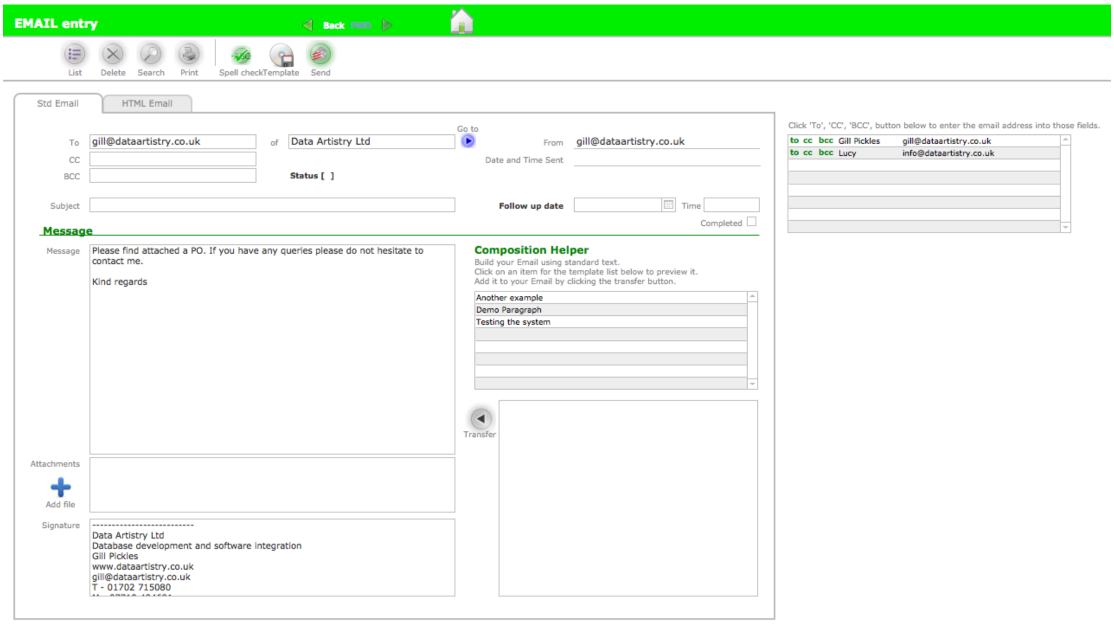


4.4 Correspondence

When you click on any of the correspondence buttons [

] one of four types of correspondence screens appear, email, call, letter or fax entry. When you print the letter or fax options the layout is transformed to appear as your normal stationery even though when you create your correspondence the standard entry screens are shown.

4.4.1 Email



The email button will mostly be used for emails that you generate from your database going out to your client. It is a good idea to record important business messages from here to clearly record the contact with your client. PrintAdmin is not set up to receive messages back into the database – the responses to any messages you send will be returned to your normal inbox in the email client of your choice, but even starting an email conversation here means that it is easy to refer back to your standard messages if you need to. There is no reason why you shouldn't also open a message record, to copy back to the database something that you may have received in to your standard inbox.

One final point to make about sending emails from the database is that these messages can be viewed by any user[3] using the database, unlike your standard email inbox, which is only available to the user logged in and the message creator.

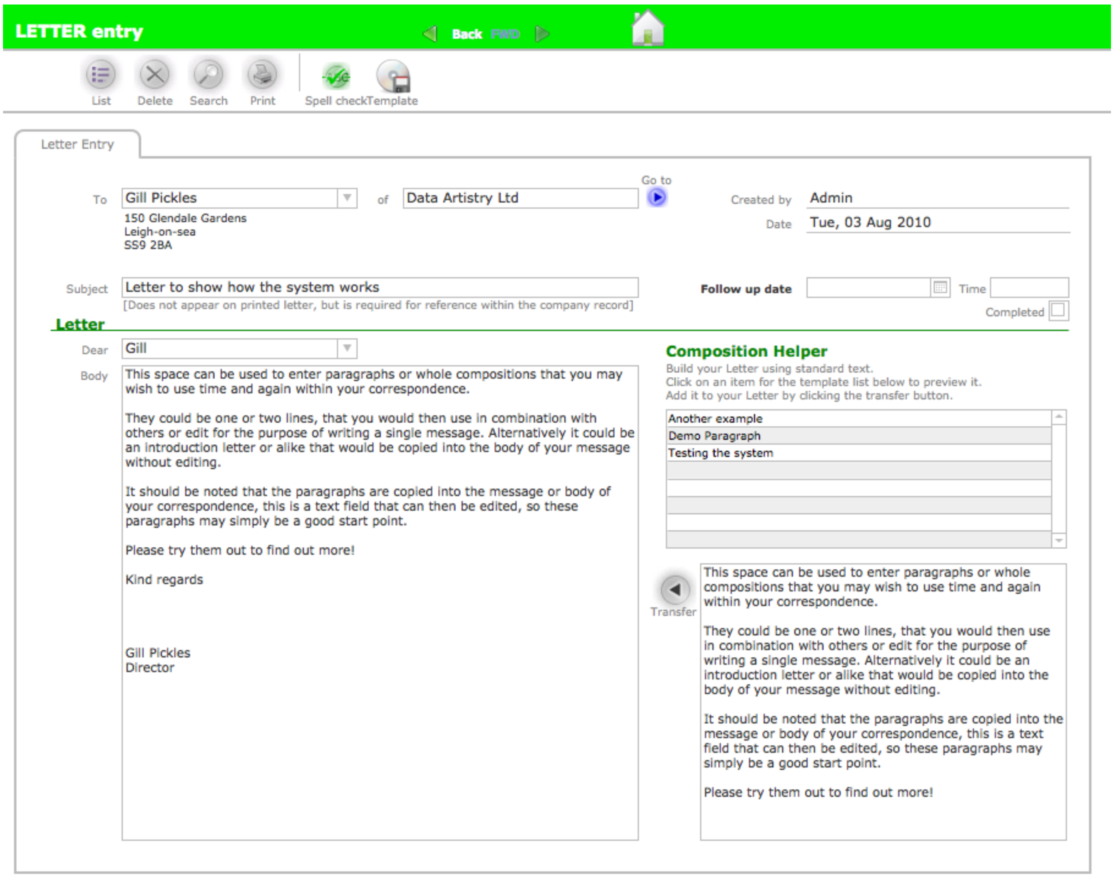
There is also an option to send HTML Emails[2] however they are pasted into the HTML message field and would need to be created outside of your database. These can also be saved as templates but require the SMTPit plug-in to send them, unlike the standard email messages which use your normal email client e.g. Outlook or AppleMail to send the message.

4.4.1.1 Composition Helper

The composition helper (shown on the right in the screen above) lists the templates that are available from standard paragraphs. Clicking on a template name shows a quick preview in the bottom right section, then clicking on the arrow to the left of that preview will insert the text into the body of your correspondence, you can then add, or edit this text in whatever way you wish.

[3] Multi-user versions only

4.4.2 Letter Entry

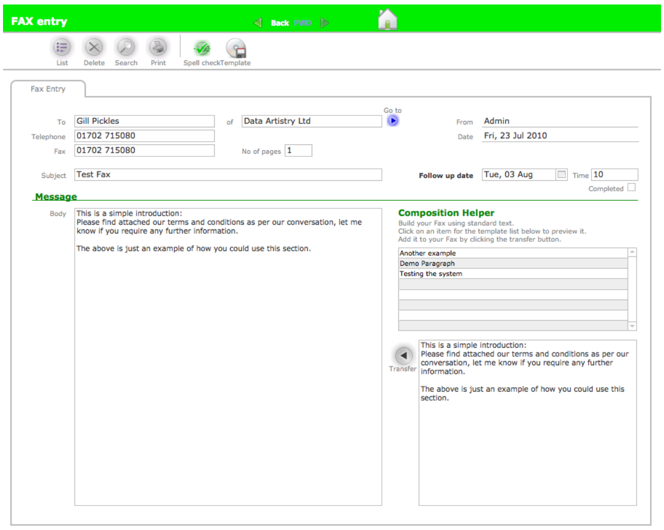


All of the correspondence entry screens look similar, but when you click the print button the correspondence is formatted with your company logo and in a print style. These screens are only to assist with entry and to accommodate extra items like ‘subject’ on the letter. This is used in the tabbed section correspondence in the company record to make it easy to review each contact that has been made without having to drill down further to review the actual letter or other item of correspondence.

4.4.2.1 Template

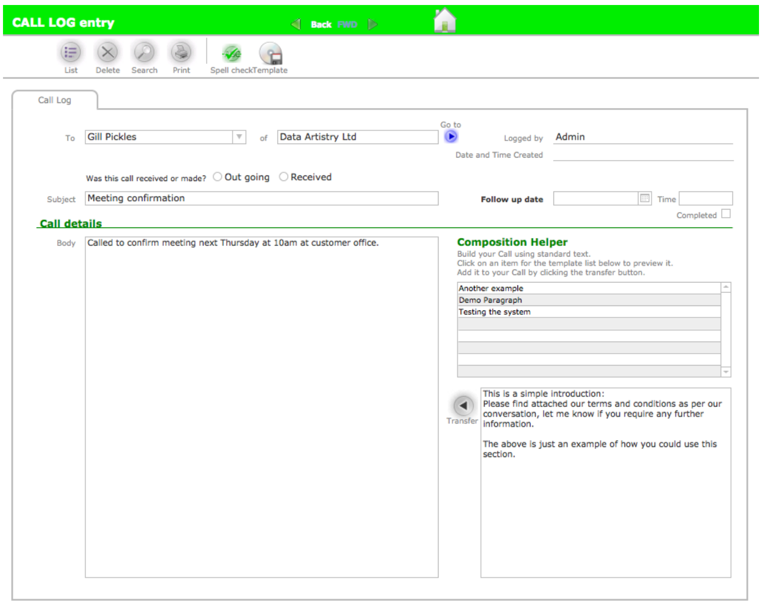
The correspondence entry screens have a ‘Template’ button. When you have typed an entry that you feel would be useful to keep, click this button to retain the body of the correspondence as a standard paragraph, making it available for use with other correspondence records and marketing.

4.4.3 Fax Entry



The fax entry shown above works just as all the other items of correspondence. Click on the print button to transfer the entry into a print format with company logo. It is then possible to fax directly from the database however this is dependent upon a system level fax utility being available, if this is available you will be able to select the fax device from your list of printers.

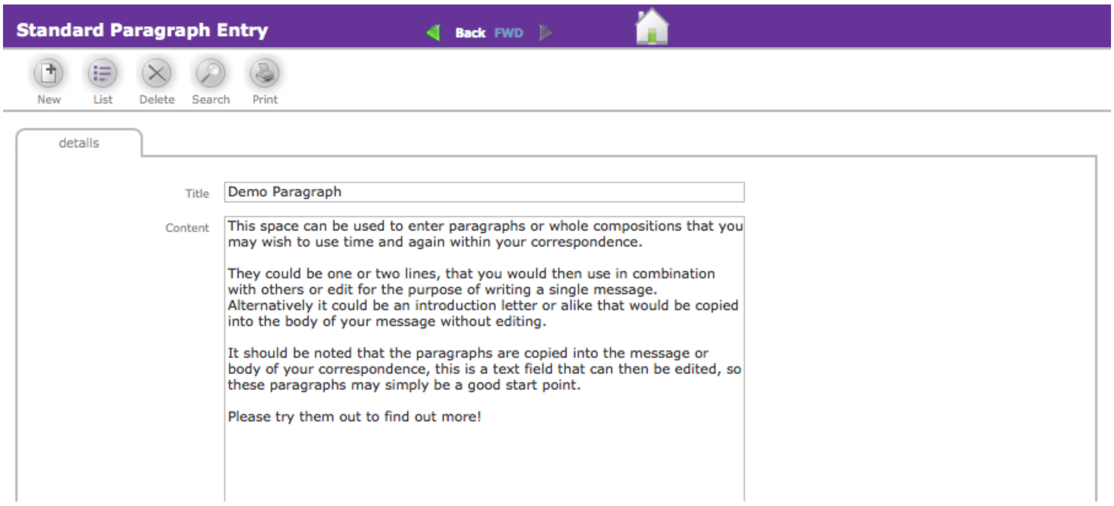
4.4.4 Call Logs



Call logging is a crucial part of sales and contact relationship management. This section isn't complicated, log the call as either received or outgoing, give it a title (for the benefit a easy review within the client record) and type as much or as little detail about your conversation as you feel necessary. The composition helper is there to use for repetitive entries even within this section.

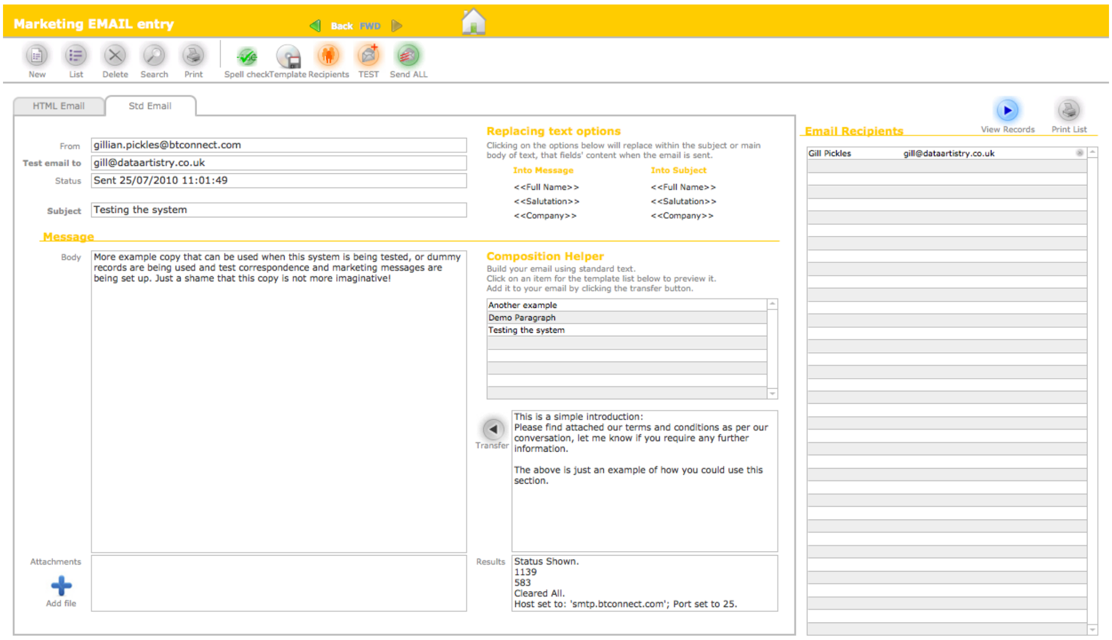
4.5 Standard Paragraphs

Text that you often repeat when writing to clients or suppliers can be kept within the standard paragraphs section. This may be a regular sign off to an email, a company introduction letter, or other marketing texts, whole letters or just paragraphs that you use regularly. It will then appear in the correspondence composition helper templates list, making a letter or email easy to build by selecting various pieces of text that you keep under this section.



4.6 Marketing

There are two ways of marketing using the PrintAdmin database, Marketing Letters and Marketing Emails. The principles of creation are the same for both sections, only the delivery method differs.


Marketing EMAIL entry
Back
FWD
New
List
Delete
Search
Print
Spell check
Template
Recipients
TEST
Send ALL
HTML Email
Std Email
From
gillian.pickles@btconnect.com
Test email to
gill@dataartistry.co.uk
Status
Sent 25/07/2010 11:01:49
Subject
Testing the system
Replacing text options
Clicking on the options below will replace within the subject or main body of text, that fields' content when the email is sent.
Into Message
Into Subject
<<Full Name>>
<<Salutation>>
<<Company>>
<<Full Name>>
<<Salutation>>
<<Company>>
Message
Body
More example copy that can be used when this system is being tested, or dummy records are being used and test correspondence and marketing messages are being set up. Just a shame that this copy is not more imaginative!
Composition Helper
Build your email using standard text.
Click on an item for the template list below to preview it.
Add it to your email by clicking the transfer button.
Another example
Demo Paragraph
Testing the system
Transfer
This is a simple introduction:
Please find attached our terms and conditions as per our conversation, let me know if you require any further information.
The above is just an example of how you could use this section.
Attachments
Add file
Results
Status Shown.
1139
583
Cleared All.
Host set to: 'smtp.btconnect.com'; Port set to 25.
Email Recipients
View Records
Print List
Gill Pickles
gill@dataartistry.co.uk

4.6.1 Creating marketing messages

4.6.1.1 Step One – Create a new message

Create the message by clicking on the new button is the usual way. Enter a 'from' email address and a 'test email to' address. These are not entered automatically as it is likely you will use a specific account to send marketing emails from that differs from your standard email address – if you don't you should consider this as a way of working. The test address ideally should be an external email account that will allow you to see the message in the style that your recipients would see the message.

4.6.1.1.1 HTML Messages

There is no HTML editor within the database; usually this will be copied in from another source. Please note that the full file path to any images used within the message must be included in the html. Alternatively you can embed the images in each message by using the 'inline' option, which basically attaches the image files to each message sent out. The inline method is only recommended if the images are few and of a very small size.

4.6.1.1.2 Rich text messages

This is found by clicking the Std Email tab. Please note that by entering a message into the body of this section over-rides the html option and only rich text will be sent.
There are some additional features within this section, the ability to insert key fields into the subject line or body of your message.

At the top right of the email entry screen can be found the buttons as shown above. By clicking directly on the substitute options the text is inserted as chosen. Just prior to the message being sent it is checked for these options and the appropriate field data inserted. Generally the full name and company are correct, but be wary of doing this without knowing that your data is good, check that salutations and correct names have been input before sending these type of messages, or instead of looking like you are sending a personal message, it will look like a mail merge and that would defeat your purpose.

4.6.2 Step Two- Select Contacts.

By clicking this button you will be taken to the company record in 'find' mode, you will be required to enter your criteria e.g. Client or simply those contacts with the 'marketing' option selected, but these are not your only choices it can be any search available to you.
Important note: Irrespective of whether you chose the 'marketing' option only those contacts with this selected will be marked to receive your marketing mail out. In this way you can ensure that any request you may receive from a company to 'remove from marketing' can be complied with by un-checking this box.

4.6.3 Step Three – Testing!

Once back in the global email record, 'Email recipients' list shows all those marked to receive your new message. Check through this list to ensure that all have a good email address and then you are ready to test to a specified email address. We recommend an external account (one outside of your office norm) to see how your message might be received. Especially with the html version you will need to test to ensure that your images and code are being received accurately.

Click the test message button to send a single email to the test to address.

4.6.4 Step Four – Send messages

OK you are now ready to send your messages. We recommend that you DO NOT send from your standard email address, set up an account specifically for this purpose. Why? Well unless you are dogmatic in your checking of data chances are you are going to get a few 'bounce backs' in other words messages that state unknown email address etc. and unless you want to wade through these to get your normal email… well, just something to bear in mind.

All this is set up and good to go, then click the 'Send all emails' button.

You can view 'View records' from the marketing letter and use the book at the top to see individual records to reprint or resend.

4.6.5 Creating letters directly from the marketing letter

This is still a four-stage process just as per the marketing email.

4.6.5.1 Step One – Create a new global letter

Click on the 'New' button within this section to create your message. Please note that you can include pictures on your letter to make it a little more interesting than the norm.

4.6.5.2 Step Two – Select Contacts

Search the company's section to pull out those records to receive your global letter.

4.6.5.3 Step Three – Preview

A quick check of the printed look and output using the preview button, before you print hundreds or more of these letters!

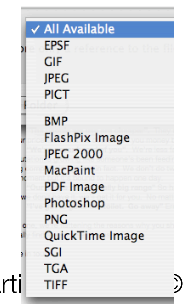
4.6.5.4 Step Four – Print All

Just as per the global emails, your output is as good as your original input, so make sure that your companies are entered well and are correct to ensure you are not wasting paper!

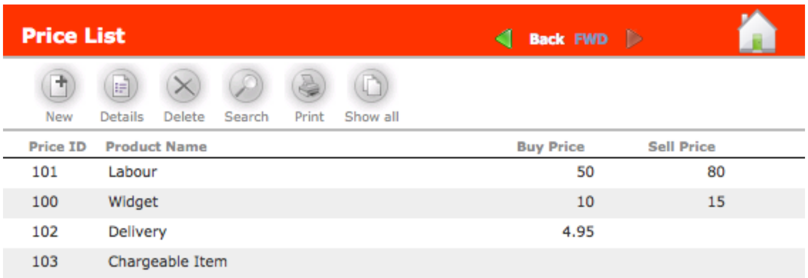
You can view 'View records' from the marketing letter and use the book at the top to see individual records to reprint or resend.

4.6.5.5 Add a picture to your letter

There are six picture boxes to work on the first two pages only. Click in any of those boxes, go to the 'Insert' Menu > Picture… and select from your filed pictures. JPEGs will work best here, but you can use the formats shown right.

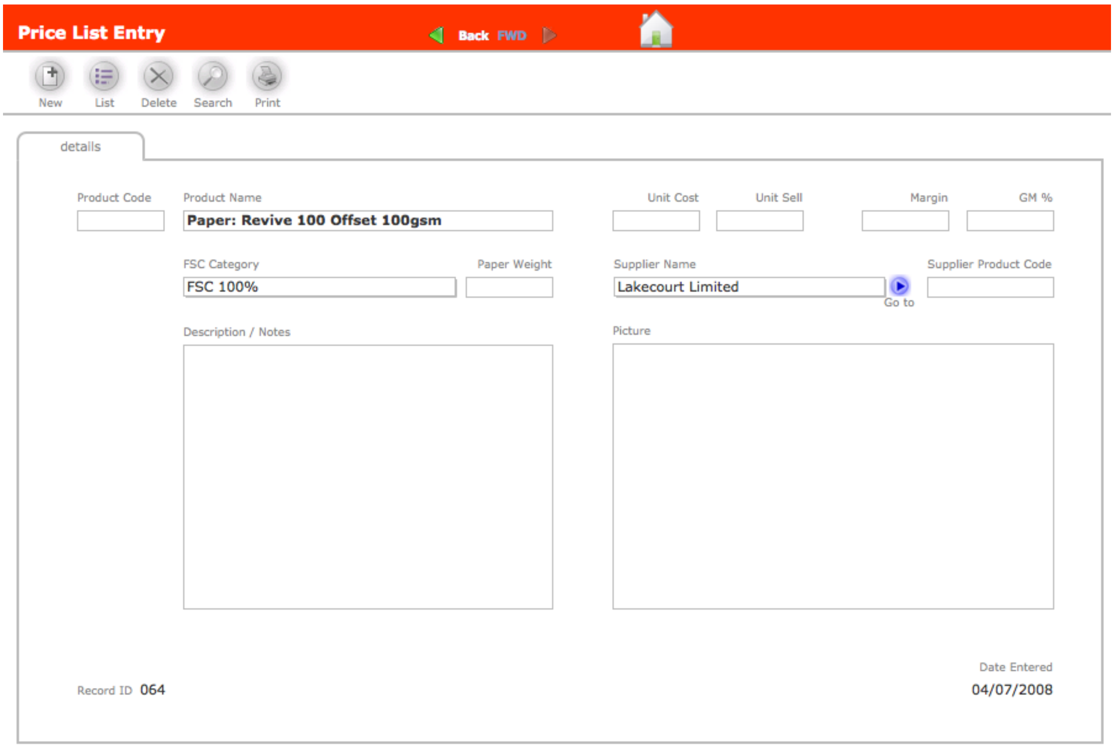


4.7 Product Price List



The price list can be whatever applies to your company. This can be something tangible or a service or function e.g. A4 Colour Scan or an hourly rate for a specific task, whatever will allow you to quote quickly and efficiently and work out your margins.

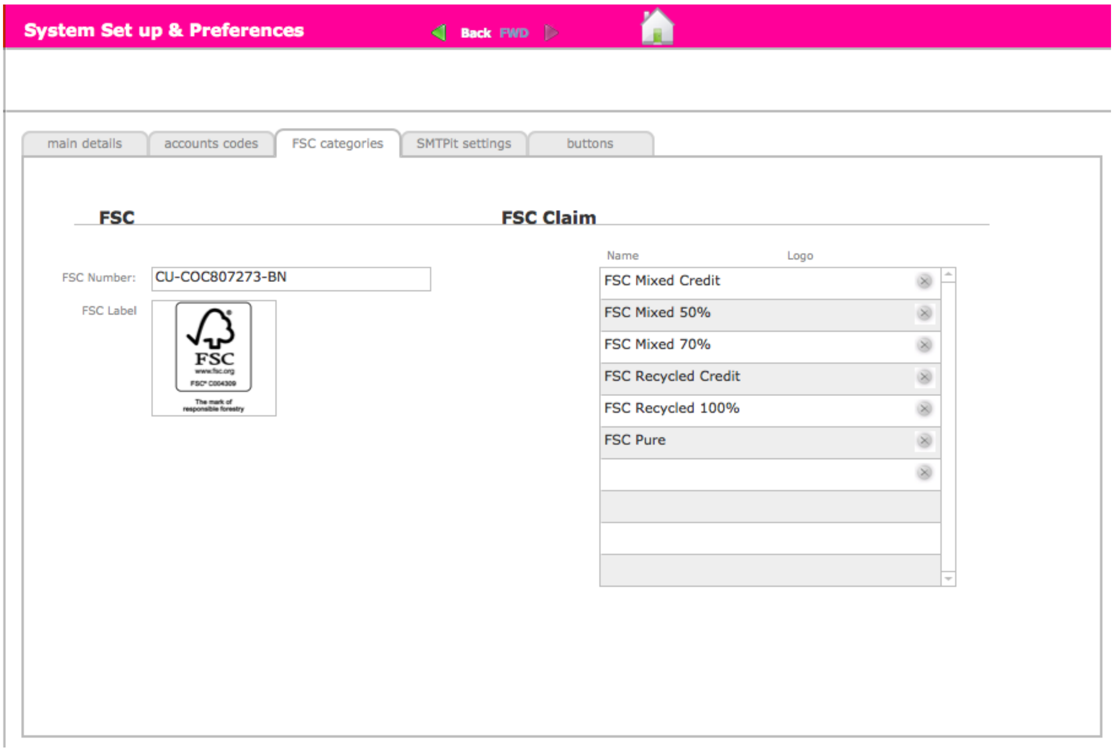
Clicking on any item will allow you to view the product in more detail. There is provision for including images to more easily identify products.



4.7.1 FSC Categories within the price list

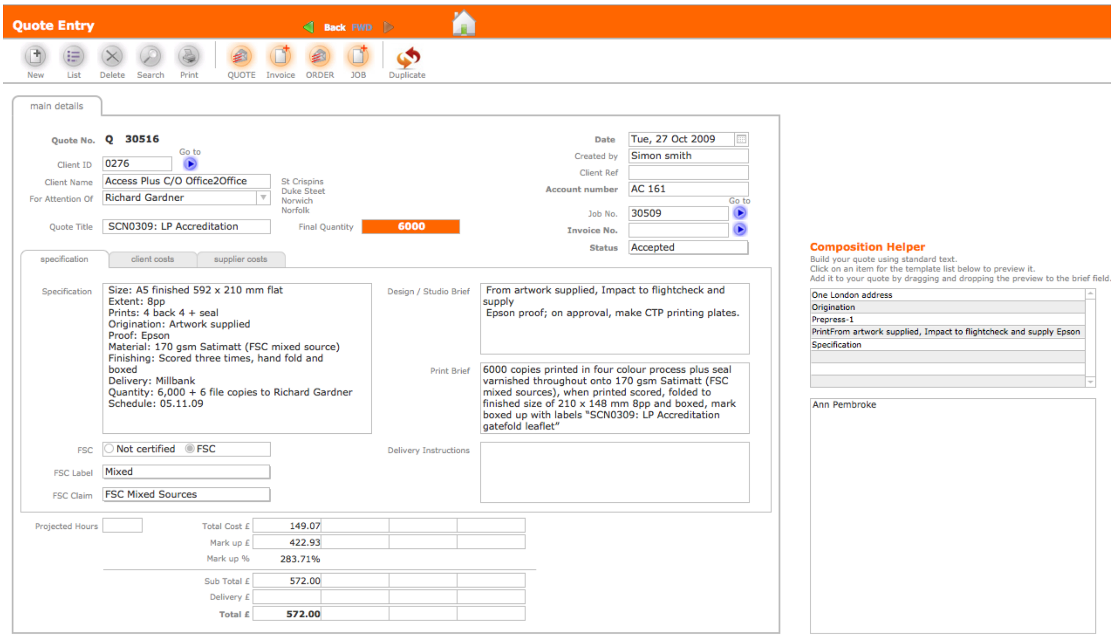
In the price or product entry screen there is a drop down menu to assign a product to an FSC category. This only applies to materials in the price list. The categories that appear in this list are those that have been set up within ‘Set up Preferences’ (see setting up categories that follow). When a job has been set up there is an option to also select FSC material types, then only the materials in this group will be available to select in the material usage section of the job analysis. This is further explained within the job details.

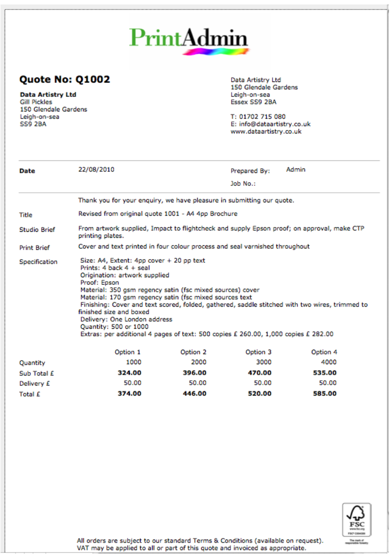
4.8 Set up FSC Categories



Choose Set up Preferences from the main menu, then click the accounts settings tab. The screen above will be shown. In the FSC section click in the last blank line and enter your material group i.e. FSC Recycled 100% or FSC Mixed Credit. There is provision to enter a logo and your company FSC accreditation number, both will be printed on job related material i.e. Quotes and Invoices.

4.9 Quotes





When entering a quote selecting a client will pull through all their address details and allow you to select from a list of contacts from that company record or simply type in a new name in the 'F.A.O.' field. This will link it back to the company record so you can see a complete history of quotes sent to that company.

The Product Code field in the main 'order items' section of the quote will allow you to select from items input into the Product Price List section of the database and pull through the supplier, description and unit cost, although you can override these if you wish. All fields can be manually entered if you want to enter an item on your quote that isn't from the standard product list and one that you don't want to keep as standard.

When you enter a quote it will show the detail above, however when you print or pdf (via email) the quote for your client, only client relevant information is shown, of course in your company style, and without the in-house details like your markup price.

There are three tabbed sections within the quote details.

4.9.1 Quote Specification

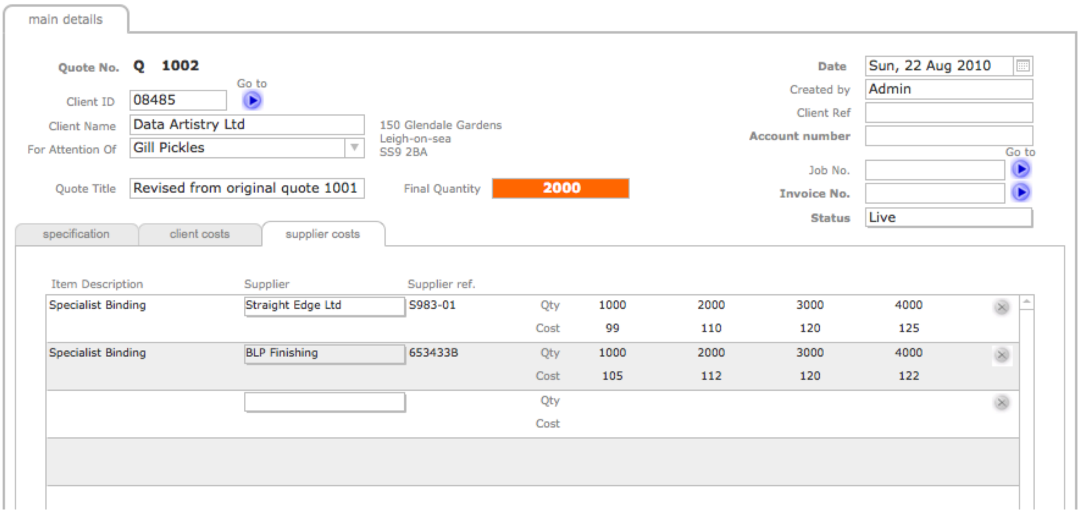
This tab allows you to input complete specifications with fields to enter the spec, studio and print briefs separately. If you prefer to print these details with a price summary without the cost breakdown, use the print or email buttons from this screen.

4.9.2 Quote Cost Breakdown

This screen allows both entry of costs, to work out your client price and if you wish to present the numbers shown in this entry screen use the print or email buttons here. Please note that the 'mark-up' fields are not displayed on the printed quote, so you must ensure that any mark-up is included in the main costs entered and not as an overall addition as it will appear that things don't add up correctly.

4.9.3 Quote Supplier Costs In

The third tab in the quotes screen allows you to keep a record within the quote of what supplier costs were received in order that you can put together your client costs e.g. perhaps there was a specialist finishing requirement or any other outsourced service.



4.9.4 Create PO's from Quote

You can generate or view a PO by clicking on the PO number box in the order items list, any items sourced from the same supplier will be put together onto a single PO from that quote.

4.9.5 Create a Job from the quote screen

Click the Job button to pass the final quote details into a new job record. Important note: Select a quantity option to correctly bring through the quantity and final cost to the job screen.

4.10 Selecting an Option to specify quantity

The Options within the quote allow for four different quantities as often a client will want to look at the most cost effective print quantity.
While you can cost each amount ultimately the job will proceed with one of those choices, in the orange slug select an option, 1,2,3 or 4 and this will then bring through the final quantity and cost, this is the detail that is passed onto the job record when this is created, or when a quote is selected in the job record.

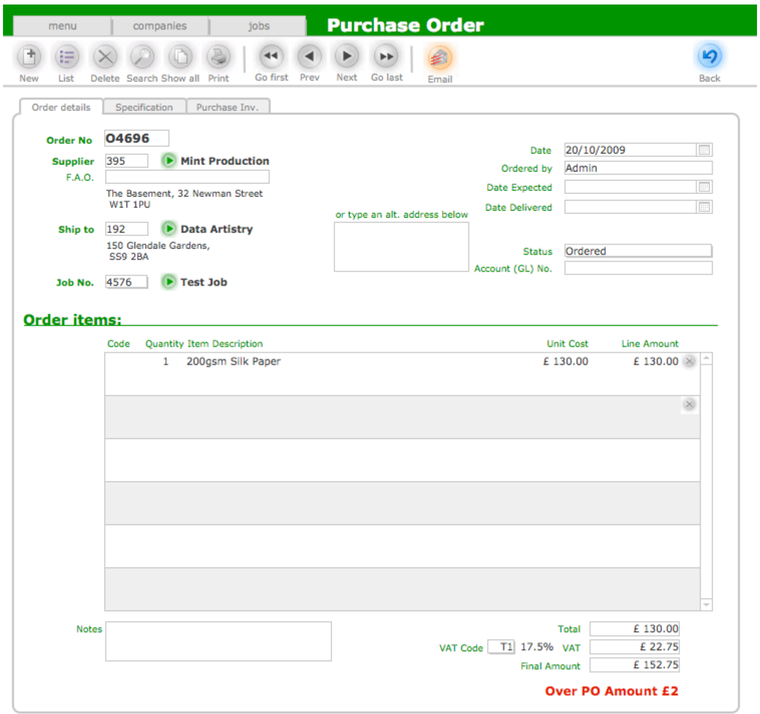
4.10.1 Create an Invoice from Quote

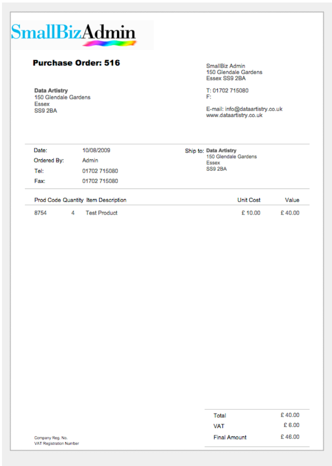
To generate an invoice from the quote click the 'Invoice' button, this will pull through all details onto an invoice, mark the quote as invoiced and record the invoice number against the quote in the top right so that you know it has been invoiced.

4.10.2 Email Quote

The orange 'Quote' button will PDF the quote and attach it to an email. PrintAdmin will pause once the email has been created to give you a chance to personalise your message, although some standard text is already input to the email for you.

4.11 Purchase Orders





Purchase Orders can be created in several different ways: Manually by clicking the new button within the Purchase Orders section of PrintAdmin and entering a supplier, ship to etc., or from the new PO button within the Job details, this will enter the job number after creating a new PO.

Mainly though the Purchase Order will be generated directly from the Quotes, by clicking on the PO box to the far right of the item in the body of the quote. If there is more than one item sourced from the supplier they will all be included in a single PO. The PO number is recorded in the quote against the item line.

When printing or emailing the PDF you should be aware that the Purchase Order has a second page for the Specification. When outsourcing some aspects of print purchases it may be necessary to detail more than just a one-line description with a cost. By clicking on the Specification tab there is provision to enter a very detailed description of your requirements.

You can search PO's just as any section, allowing you to pull out records specific to a supplier or date range, maybe both, or any combination of criteria. The list in the Purchase Order section has summary fields, meaning that it will total the found records, basically this is very quick customised reporting within the Purchase Order section.

Purchase Order List

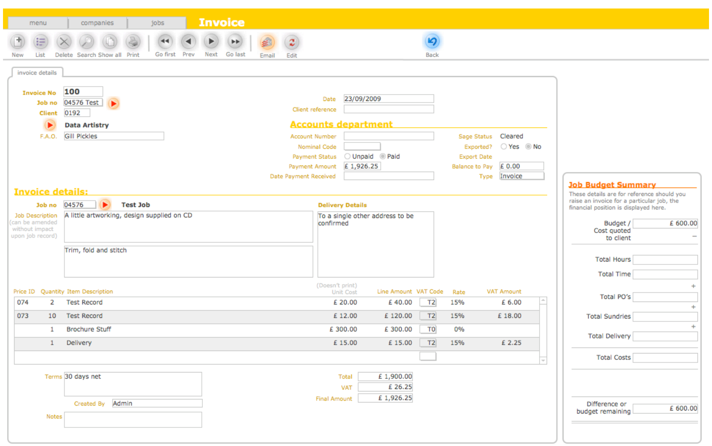
PO No	PO Date	Supplier	First line of order	Total Net	VAT Amount	Final Amount
500	16/08/2006		Adobe Freehand 11.0 MAC RB	£ 750.00	£ 131.25	£ 881.25
501	13/06/2007	Computer 2000 Ltd	Adobe Acrobat 7 Standard MAC RB	£ 150.00	£ 26.25	£ 176.25
				£ 900.00	**£ 157.50**	**£ 1,057.50**

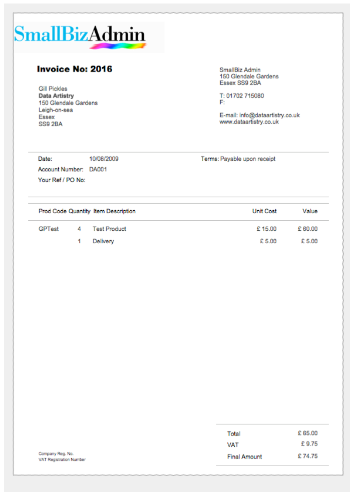
All summary lists total, specifying individual searches will allow you to break out sets of figures e.g. search by a supplier and further identify records by date. Searching within FileMaker is very powerful and effectively gives you a multitude of reports.

4.11.1 Emailing Purchase Orders

The 'Email' button will PDF the PO and attaches it to an email. PrintAdmin will pause once the email has been created to give you a chance to personalise your message, although some standard text is already input to the email for you.

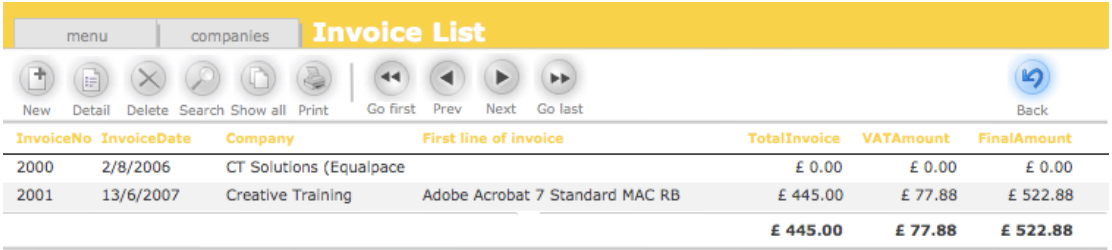
4.12 Invoices





The best place to create an invoice is from within the quote or Job record. This will automatically setup the client, contact, and summarise the quoted cost details. You can if you wish simply click 'new' from within invoices, but the first method is by far the quickest if you have a quote set up.

You can search Invoices just as any section, allowing you to pull out records specific to a client or date range, maybe both, or any combination of criteria. The list in the Invoice section has summary fields, meaning that it will total the found records, basically this is very quick customised reporting within the Invoices.



menu | companies | **Invoice List**

New | Detail | Delete | Search | Show all | Print | Go first | Prev | Next | Go last | Back

InvoiceNo	InvoiceDate	Company	First line of invoice	TotalInvoice	VATAmount	FinalAmount
2000	2/8/2006	CT Solutions (Equalpace		£ 0.00	£ 0.00	£ 0.00
2001	13/6/2007	Creative Training	Adobe Acrobat 7 Standard MAC RB	£ 445.00	£ 77.88	£ 522.88
				£ 445.00	**£ 77.88**	**£ 522.88**

4.13 Accounts Department Options

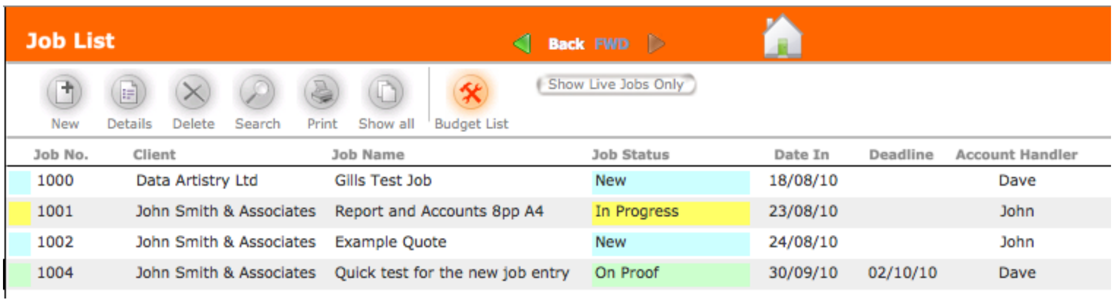
Under this section within Invoices there is provision to input when and if an invoice has been paid, also how much has been paid. This figure shows you a balance outstanding and totals in the list view. When statements are generated all invoices that fall within the period specified are pulled through in addition to those that are still marked 'unpaid'.

4.13.1 Emailing Invoices

The 'Email' button will PDF the Invoice and attaches it to an email. PrintAdmin will pause once the email has been created to give you a chance to personalise your message, although some standard text is already input to the email for you.

4.14 Jobs

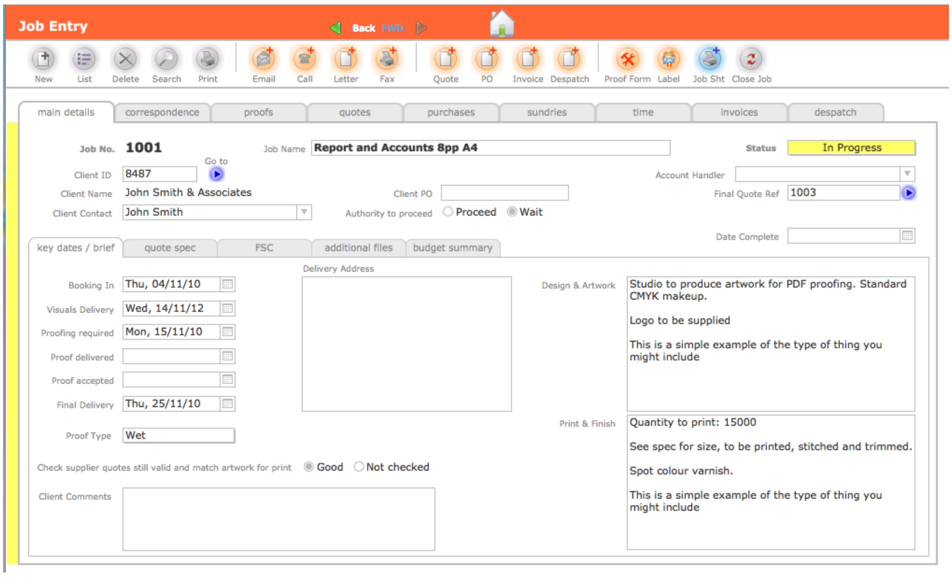
The job list always shows by default live jobs. These are coloured according to the Job Status table (see Job Status section for further details on what this entails).



Job List | Back | FWD

New | Details | Delete | Search | Print | Show all | Budget List | Show Live Jobs Only

Job No.	Client	Job Name	Job Status	Date In	Deadline	Account Handler
1000	Data Artistry Ltd	Gills Test Job	New	18/08/10		Dave
1001	John Smith & Associates	Report and Accounts 8pp A4	In Progress	23/08/10		John
1002	John Smith & Associates	Example Quote	New	24/08/10		John
1004	John Smith & Associates	Quick test for the new job entry	On Proof	30/09/10	02/10/10	Dave

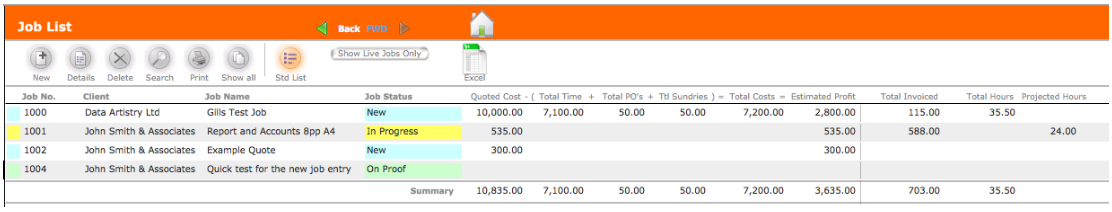


Clicking on any job in the list takes you into the job details screen. Here the key dates, specification, and FSC details (see FSC reporting for further details) can be entered. The Print button will print a job bag with all of the specification in place.

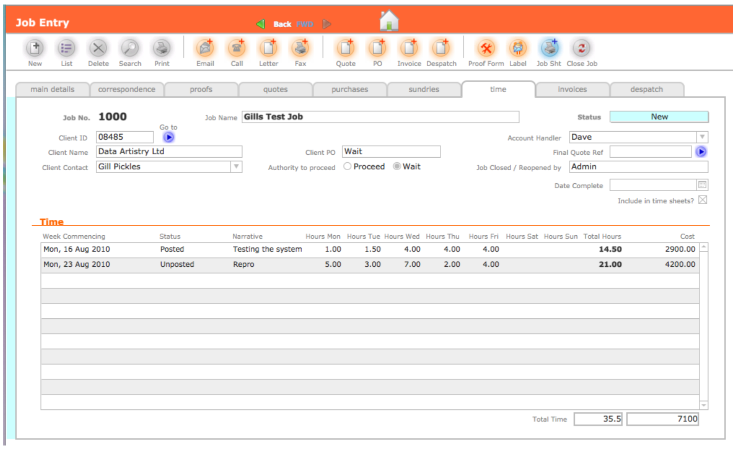
The job details are further broken down into tabbed sections: Proofs; Correspondence; Quotes; Purchases; Sundries; Invoices; Time and Despatch. Each of these tabs will show the data that has been created in relation to the job e.g. all time sheet information can be found under the Time tab and these figures are totalled in the budget summary and the budget list. The same applies to other costs associated to the job.

4.14.1 Job Budget List

The budget list shows the financial status in list form, the figures are also shown on the main job details screen.

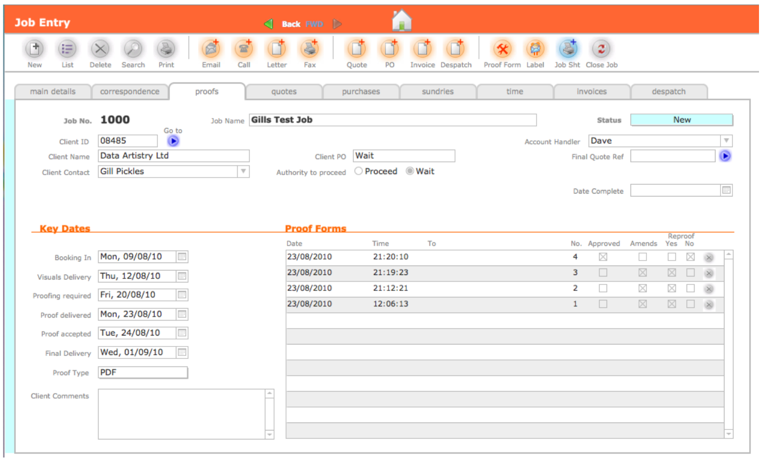


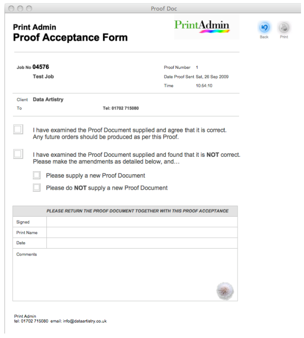
The tab across the main details for jobs show linked items e.g. quotes, clicking on any item under these views will take you to that item.



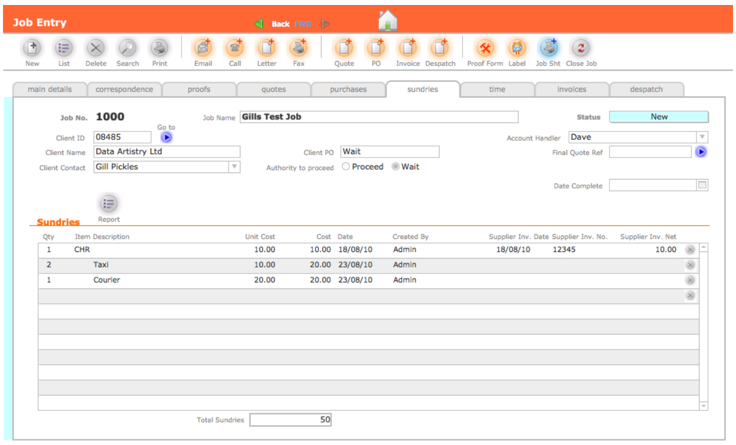
4.14.2 Proofs

When sending a proof there is a form that can also be attached to the proof, or if you prefer just keep the details in the job record. Click on the Proof Form button to create a new one. Once in existence then you can return to the proof forms section and update the details within the portal, or open the proof form again and amend the record.



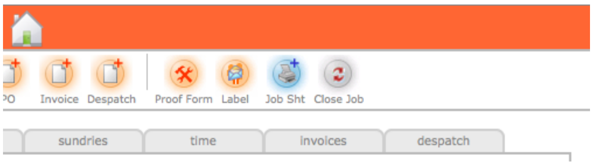


4.14.3 Sundry Job Costs



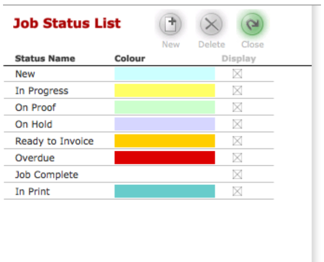
Sundries are entered directly onto the job record, unlike purchase orders, that take you to another screen to create them. They can be entered with the assistance of the price list or directly into the line itself, the description, quantity and the unit price.

4.14.4 Closing a Job



Please use the ‘Close Job’ button when a job is complete. This updates the status, close date and time sheet inclusion field to remove the job number from further time entries. Using this button does not mean the record is removed, but by updating it in this fashion it no longer appears in the live job list and simply remains in the background.

4.15 Job Status’s



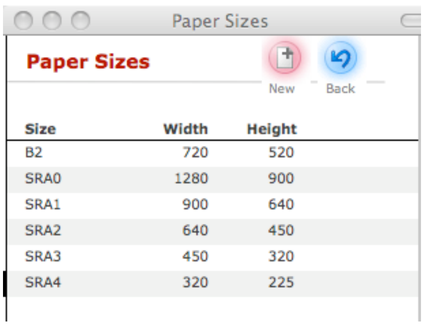
Status Name	Colour	Display
New		
In Progress		
On Proof		
On Hold		
Ready to Invoice		
Overdue		
Job Complete		
In Print		

The job status’s can be set up entirely as you want to define them, copy and paste your colour blocks from any graphics application, or from within a blank FileMaker database.

NOTE: It is recommended that you retain “Job Complete” as this will be used irrespective of whether it is in this list or not when the ‘Close Job’ button is used in the Job record and this ensures that it remains in the drop down list for searching within jobs.

NOTE 2: It is also recommend that you use pale colours as it will be easier to read your job list details off of a lighter background.

4.16 Paper Sizes



Size	Width	Height
B2	720	520
SRA0	1280	900
SRA1	900	640
SRA2	640	450
SRA3	450	320
SRA4	320	225

The paper sizes table is very simple, click new to enter paper sizes that are appropriate to your print work. This is to facilitate the calculation of FSC paper usage within job details.

4.17 FSC Set up and Using Paper Usage

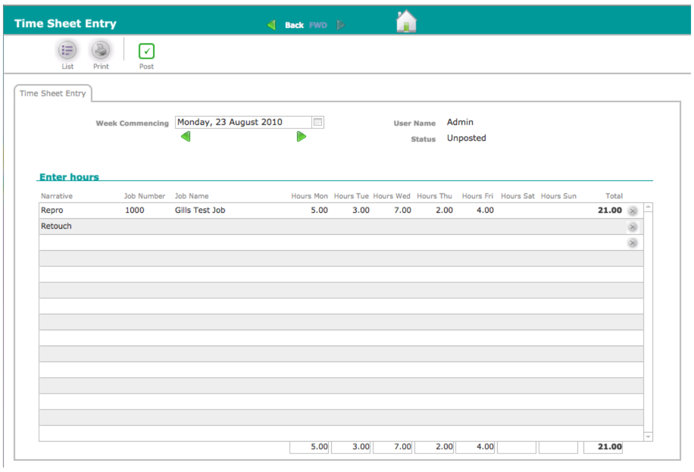
There are several things that need to be entered and in place before FSC reporting can be used.

- Set up Preferences, input your FSC groups and logos e.g. FSC Mixed sources, don't forget to put in 'Not Accredited' as one of your paper groups.
- Enter your Paper options into the price list and associate them to a FSC group
- When the job has been printed, return to the job record and input paper type, size and quantity used.

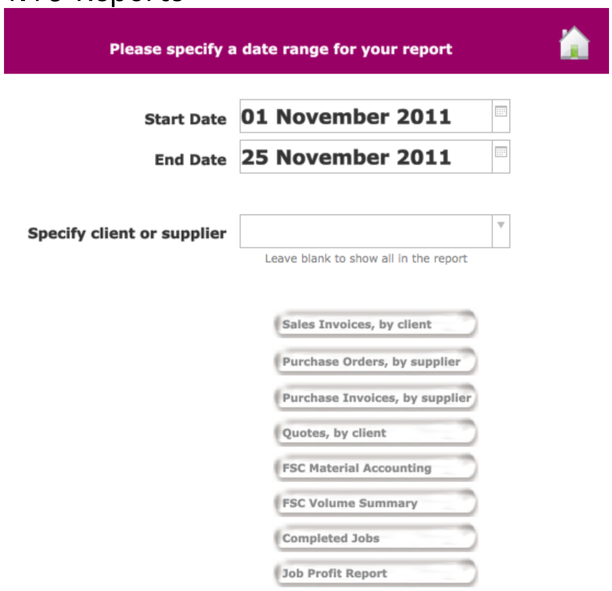
With these things in place a meaningful FSC report can be produced.

4.18 Time Sheets

Time Sheets are entered weekly to ensure that it is a quick as possible, this means that those users who only need to enter time need not wade through other aspects of the database to input time. They can update a single record with multiple jobs.
Only 'Live' jobs will appear in the drop down list for entering a job number.
NOTE: the time sheet start date can be found in the User record.



4.19 Reports



The following reports are available pre-scripted within PrintAdmin:

4.19.1 Sales Invoices, by Client

4.19.2 Purchase orders, by Supplier

4.19.3 Purchase Invoices, by Supplier

4.19.4 Quotes, by client

4.19.5 FSC Material Usage Report

4.19.6 Jobs in Progress

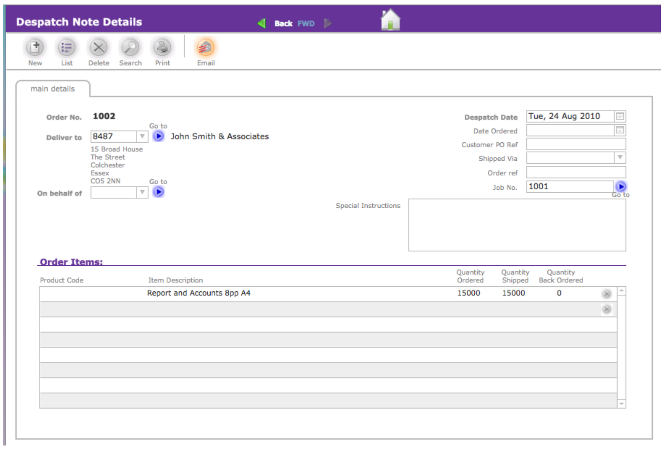
4.19.7 Completed Jobs

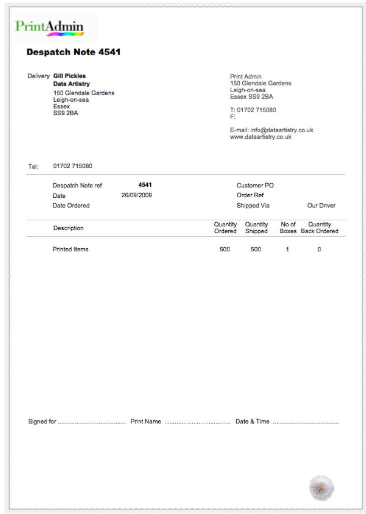
4.19.8 Job Profit Report

4.19.9 Material Usage Report (Quotes)

With the exception of ‘Jobs in Progress’ that simply lists all the live jobs on the system, all other reports are produced for the date range that you specify in the screen shown above.

4.20 Despatch Notes





A despatch note can be created by clicking the new button within the despatch notes section. This can be used for sending individual proofs or perhaps finished print jobs.

Once again, the entry screen conforms to the database format, but the print (or email with PDF) retains the printed in the style of your companies' stationery.

Use the 'Insert above address' to automatically enter the client address that you have chosen above, otherwise this is a free type box so that you can enter whatever you wish.

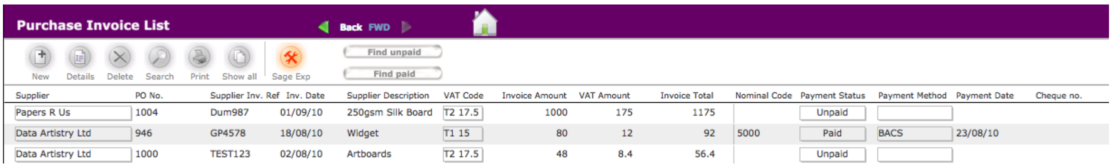
4.20.1 Email Despatch Note

The 'Email' button will PDF the Despatch Note and attaches it to an email. PrintAdmin will pause once the email has been created to give you a chance to personalise your message, although some standard text is already input to the email for you.

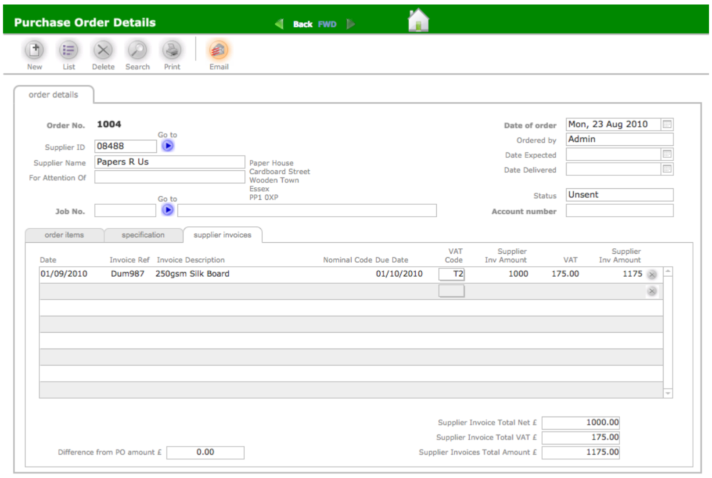
This may seem a little strange given the idea is generally to attach the note to the goods when they are being shipped, however if something is going directly from the supplier you may wish to send your paperwork in this fashion, or perhaps you wish to send this directly to your supplier so they may include your paperwork for you.

4.21 Purchase Invoices

There is provision to enter all your Supplier Purchase Invoices into PrintAdmin and export them to Sage accounts. Clicking on ‘New’ will bring up a dialogue requesting either a PO or Job number to link the record back to a project.

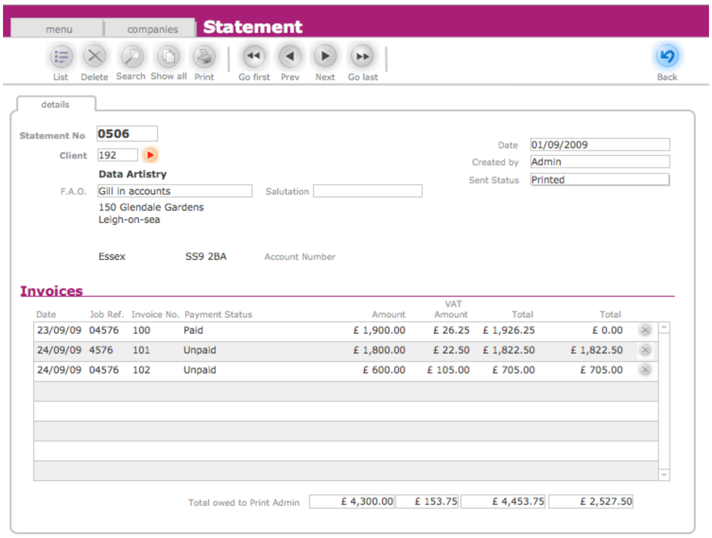


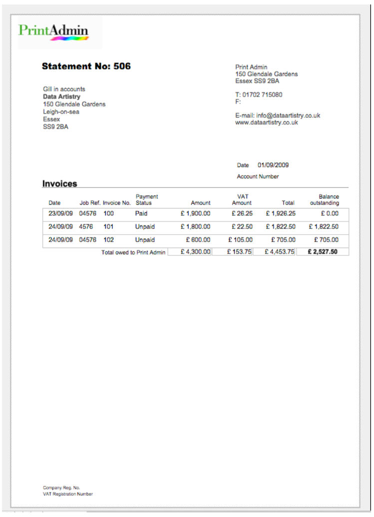
Alternatively you can search for a PO, switch to the Purchase Inv. tab and enter the details of your invoice directly into the last line of the portal.



Should the Purchase Invoice not be of the same value as the Purchase Order then an alert will be appear both at the base of the entry screen and in the Purchase Invoice List, should you need to refer back to the supplier.

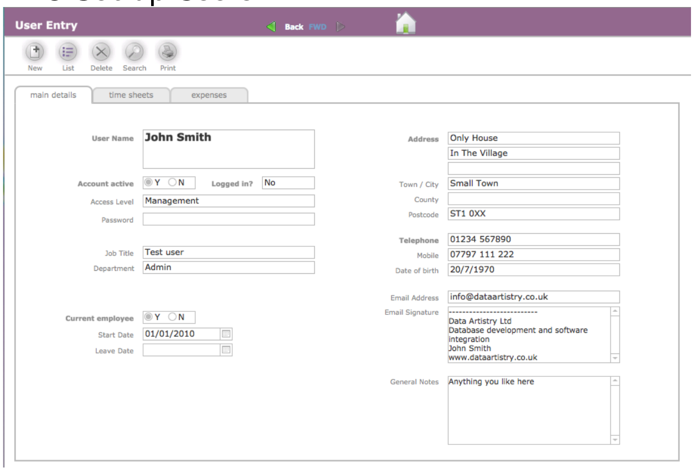
4.22 Statements





Clicking the ‘Run Statements’ button from the main Statements List produces statements. The next screen asks you for a start date; continue and the system will then look through the invoices for all invoices created since that date through to todays’ date. Any invoice prior to that date that remains as ‘Unpaid’ will also be included on the Statement. The Print button will produce the printed version that incorporates your company branding.

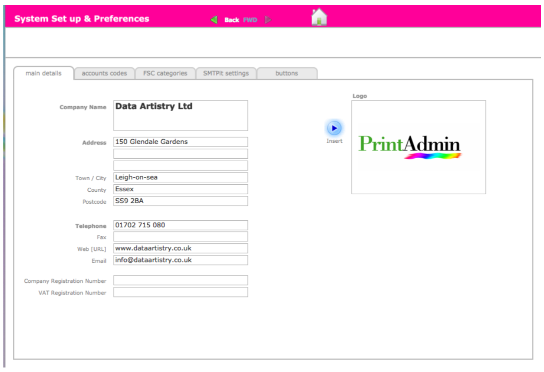
4.23 Set up Users

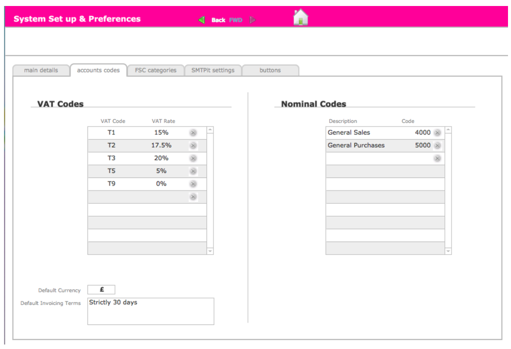


The set up users button will take you to a list of PrintAdmin's users. Before anyone can access the database they must be set-up with a user name and password. From the User List click on any name to view their details, depending upon your access privileges will be the details that you are able to see, basic users can only see name and address details of any user. A user with 'Management' privileges can see and set-up names, passwords, employee start dates and rates.

Clicking the 'new' button will take you to a basic details screen and once they have been entered your new user is set-up and ready to go, although it is good practise to complete the rest of the details.

4.24 Preferences





The setup preferences button from the main menu will take you to the screen shown above. Completing the details here will filter through to all the 'stationery' aspects of PrintAdmin e.g. Purchase Orders in Print or PDF mode. This means that should you change your address or phone number it will instantly filter through to every printed layout throughout the system.

4.24.1 Setting up Nominal and VAT Codes and Rates

Click on the accounting tab to enter your nominal and VAT codes, these should match those already set up in your accounts system.

4.24.2 Invoice Terms

Your invoice terms can be set up in this section so that for all new invoices the terms appear exactly as you wish to phrase them. The default is 'Strictly 30 days net' but please change this to suit your own purposes.

4.24.3 FSC Categories

The FSC groups that are pulled through directly onto the job and price list screens are generated according to the entries made in the FSC section under the preferences tab. You can also assign a logo to each category so that when documentation that belongs to a job with an FSC category is printed, the associated logos also print. The FSC accreditor provides these logos.

4.24.4 Emailing directly from FileMaker

There are also preferences for email. It is possible with the addition of a plug-in to email directly from FileMaker and not to use your standard email client. This is where you input your mail settings.

The above screen shows all of the SMTP options, these can be found from your standard email client under the SMTP account settings. It is very much a case all trial and error, there are a plethora of email methods and your mail server will require a combination of the settings above, although that which is shown generally works.
However if you find that these settings don't work, try a different port number or authentication type, there are only a few options here so it shouldn't take long to work out the correct one.
Important Note: Sometimes the use of a SMTPit Pro requires the setting up of mail relaying. If you get this error when first attempting to send mail from PrintAdmin, please refer directly to the SMTPit Pro help at: http://www.cnsplug-ins.com/faq.htm?product=SMTPit%20Pro

4.25 Finding or Searching

There are many ways to 'get back' information from your database, but all involve searching or using the reports. The 'Search' option may appear simple - it is, but using a variety of techniques can extract whatever information you may need, including 'everything but' searches if you use the omit option. For example if you wanted to find all the companies in your database bar suppliers, then chose search, enter 'supplier' under the category and select the 'omit' option in the status bar as shown below.

4.25.1 FileMaker Search Help

The FileMaker help is extensive on this subject and definitely worth checking out, but the most important part has been extracted here into this document.

Finding ranges of information

You can find ranges of information, such as all records that contain a field value that is greater or less than a number, or between two particular dates. A range is different based on the data type:

- **Numbers:** least to greatest
- **Dates, times, and timestamps:** earliest to latest
- **Text:** first to last word, based on the index order of words (not the sort order). A word can be a single character; for example, a find on a field for `<M` would return every record that contains a word less than `M` in the field's index order.

To find ranges of information:

1. Start a find request.

   For more information, see Making a find request.

2. Refer to the following table for examples of different ways to search for a range of information.

To find values that are	Use this operator	Examples

Less than a specified value	<	`<40`
		`<9/7/2010`
		`<M`

Less than or equal to a specified value	<= or ≤	`<=95129`
		`≤05:00:00`
		`<=M`

Greater than a specified value	>	`>95129`
		`>9/7/2010`
		`>M`

Greater than or equal to a specified value	>= or ≥	`>=100`
		`>=9/7/2010`
		`≥8:00`
		`≥M`

Within the range you specify	.. or ...
	(two or three periods)
		`12:30...17:30`
		`1/1/2009..6/6/2010`
		`A...M`
		`Mon..Fri`

Within the sub-range you specify	{..} or {...}
	(two or three periods)
		`7/{1...15}/2010`
		`{1..3}/{10..16}/2010`
		`12:{30..45}`
		`{7...9}:15 PM`

Based only on certain date or time components such as month, year, or minutes (see more examples below)	* or type nothing for each component you don't want to specify	`3/*/2010`
		`2/*`
		`2010 *:30 PM`

3. When you've entered the find criteria that you want, click **Perform Find** in the status toolbar, or choose **Requests** menu > **Perform Find**.

Notes

- When searching for ranges of information in date, time, and timestamp fields, you don't have to specify all date or time components. For example, you can type `5/2010` instead of `5/1/2010...5/31/2010` to find all dates in May 2010.
- You can combine operators to simplify range searches. For example, type `*/{10..15}/2010` to search for all dates in 2010, but only for days from the 10th through the 15th.
- Refer to the following tables for examples of different ways to search for dates, times, and timestamps.

To find dates	Type this in the field
In June 2010	`6/2010`
From July 2009 through October 2010	`7/2009...10/2010`
That occur on a Friday	`=Friday`
From the 10th through the 16th of October or November 2010	`{10..11}/{10..16}/2010`
That occur on March 1st between 1868 and 1912 in the Japanese Emperor Year era of Meiji	`m*/3/1`
That occur on December 31st between 1930 and 1940 in the Japanese Emperor Year era of Showa	`S{5..15}+12+31`

To find times	Type this in the field
In the 3 o'clock hour, not including 4:00 PM	`3 PM`
Between 8:00 AM and 8:59:59 PM	`8 AM...8 PM`
In the morning	`AM`
Any of the times 4:30, 5:30, and 6:30 PM	`{4..6}:30 PM`

To find timestamps	Type this in the field
In the 3 o'clock hour today	`// 3 PM`
In the 7 o'clock hour in May 2007	`5/2007 7 PM`
That occur on a Monday in 2010	`=Mon 2010`
From the 10th through the 16th of November 2010 and from 3:00 PM to less than 6:00 PM	`11/{10..16}/2010 {3..5} PM`

5 Summary

PrintAdmin has lots to offer in a straightforward manner. There are no hoops to jump through before you can start using it, just set up the preferences page with your company name and address and jump in. The benefits of easy administration will be revealed within days of using the system allowing you to get on with your real job.

We wish you much success with both the use of this software and running your business.